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**Welcome to the Vaccine Management System!**

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**ARIZONA DEPARTMENT  
OF HEALTH SERVICES**

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## **-- Purpose --**

The purpose of this User Guide is to provide detailed information of the resources available on the Clinic Portal, and how to carry out the tasks and responsibilities of the Clinician role. The Clinic Portal will be used by the Clinician to administer vaccines and maintain the vaccine data.

## **-- Role Overview --**

The role of the Clinician is to review the patient's personal information, screening questions, immunization history, and administer the selected vaccine. Upon administering the vaccine, the Clinician is responsible for recording all of the required vaccine data.

## **-- Clinic Portal Features --**

- Start Appointments
- Review and Verify Patient Personal Information
- Review Immunization History
- Administer Vaccines and Record Patient Data

## Navigate the Clinic Portal as Clinician

1. From the Login screen, check the box to confirm you understand and will comply with confidentiality and acceptable use rules and click **Login**.
2. Log into the Clinic Portal using the credentials sent to your registered email address.

**Arizona Vaccination Program**

Sign up your application on our safe and highly secure platform

1

☒ I have read and attest to adhere to the ADHS [Acceptable Use and Confidentiality Agreement](#).

**Login**

[Forgot password?](#)

2

**Sign in with your existing account**

**Email Address**

Email Address

**Password**

Password

**Sign in**

Once you are logged in, the Appointments Dashboard will display. This is the default view for the Clinician.

**Dashboard**

- ✓ Patient Check-In
- Walk-In
- Summary
- Advanced Search
- Adverse Form
- Exports

Search By Appointment ID  **Search** **Clear**

**Appointments**

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS	ACTIONS
Items per page: 20 0 of 0  < < > >										



## Look Up an Appointment ID

Before you can administer the vaccine, you may need to retrieve the patient's appointment. This section reviews the steps for finding the Appointment ID if the patient is unable to provide it.

You will begin the search on the Dashboard, searching under the patient's appointment ID or their entire first or last name and date of birth.

If you're unable to retrieve the appointment with a basic search, you will use the Advanced Search tool. This feature lets you enter as few as three letters of the patient's name, which can be helpful if a name was misspelled when the appointment was scheduled. The steps for using the Advanced Search tool are detailed after the Dashboard Search

The screenshot shows the Dashboard Search interface. On the left is a sidebar with navigation links: Dashboard, Patient Check-In, Walk-In, Summary, Advanced Search, Adverse Form, and Exports. The main area has a search bar with 'Search By' set to 'Appointment ID' and a text input containing '1234'. There are 'Search' and 'Clear' buttons. Below the search bar, the results are displayed under the heading 'Appointments'. A table shows one result with the following data:

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS
1234	ABC Vaccine Event	03-07-2021	6:00 PM	Jane	Test	05-05-1955	Call-In	Not Checked In	Reschedule Cancel

## Dashboard Search

1. Click the dropdown arrow in the field to the right of Search By and select the filter you want to use.

This screenshot shows the same Dashboard Search interface as the previous one, but with a blue curved arrow pointing to the dropdown arrow next to 'Appointment ID' in the 'Search By' field. The text input field is empty and contains the placeholder text 'Enter Appointment ID'. The table below is empty, and the footer shows 'Items per page: 20' and '0 of 0'.



You can filter by:

- Appointment ID
- First Name and DOB (Date of Birth)
- Last Name and DOB

First Name and DOB  
Last Name and DOB  
Appointment ID

Search By Appointment ID Enter Appointment ID

Search Clear

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS
Items per page: 20 0 of 0									

Once you select the search filter, an entry field will display that corresponds with your selection.

- **Appointment ID:** A text entry box displays. Whenever possible, search on Appointment ID, as this search will always return a single result.

Search By Appointment ID Enter Appointment ID Search Clear

- **Name and Date of Birth (DOB):** A text entry box for first name or last name will display. A date box will also display to enter or select the DOB. When using either of the name filters on the Dashboard Search, you must enter the ENTIRE first or last name.

Search By First Name and DOB Enter First Name MM/DD/YYYY Search Clear

Search By Last Name and DOB Enter Last Name MM/DD/YYYY Search Clear



## 2. Enter your criteria and click Search.

Search By First Name and DOB ▾ Jane 05/05/1955 [Calendar Icon] Search [Q] Clear

Appointments

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS	ACTIONS

The dashboard will display all appointments that match the criteria you entered.

Search By First Name and DOB ▾ Jane 05/05/1955 [Calendar Icon] Search [Q] Clear

Appointments

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS	ACTIONS
4567	Best Vaccine Event	03-27-2021	10:00 AM	Jane	Test	05-05-1955	Online	Not Checked In	Check-in	Reschedule Cancel
1234	ABC Vaccine Event	03-07-2021	6:00 PM	Jane	Test	05-05-1955	Call-In	Done		Follow Up

## Advanced Search

If you are unable to retrieve an appointment from a search on the dashboard, you have additional options under the Advanced Search tool. With this tool you can search on either Phone number or Date of Birth (DOB) and partial spellings of the patient's first, middle, or last name.

This tool is for locating appointments only. You will not be able to schedule, reschedule, or cancel appointments from this screen. Once you retrieve the appointment, you will copy the Appointment ID and enter it into the Dashboard Search to retrieve the appointment and complete the desired action.

### 1. Click Advanced Search from the menu.

Dashboard  
✓ Patient Check-In  
Walk-In  
Summary  
Advanced Search  
Adverse Form  
Exports

Phone Number (999)999-9999 Date of Birth MM/DD/YYYY [Calendar Icon] Name Enter at least 3 letters of either first, middle or last name Search Clear

Appointments

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	STATUS
----------	------------	----	------	------	------------	-------------	-----------	---------------	-------	--------



2. Enter EITHER a phone number or Date of Birth into the designated field. Once you enter data into one of those fields, the Name field will become active.

Enter at least three letters of the first, middle, OR last name.

OR AND  
At least 3 letters of either first, middle or last name

Phone Number (999)999-9999 Date of Birth MM/DD/YYYY Name Enter at least 3 letters of either first, middle or last name Search Clear

Appointments

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	STATUS
----------	------------	----	------	------	------------	-------------	-----------	---------------	-------	--------

Click Search.

Phone Number (999)999-9999 Date of Birth 05/05/1955 Name TES Search Clear

Appointments

If multiple results are returned, you can click on any column title to sort the data in that column.

Phone Number	Date of Birth	Name								
(999)999-9999	05/05/1955	TES								
Appointments										
EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	STATUS
13	ABC Vaccine Event	1234	03-07-2021	6:00 PM	Jane		Test	05-05-1955	123-444-5555	Not checked in
13	ABC Vaccine Event	7712	03-03-2021	9:15 AM	Jane		Test	05-05-1955	123-444-5555	Cancel

When you retrieve the patient's appointment, copy the Appointment ID so you can paste it into the Dashboard Search field to retrieve the patient's record for check-in.

Phone Number (999)999-9999 Date of Birth 05/05/1955 Name TES Search Clear

Appointments

EVENT ID	EVENT NAME	ID	DATE	TIME	FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	PHONE	STATUS
13	ABC Vaccine Event	1234	03-07-2021	6:00 PM	Jane		Test	05-05-1955	123-444-5555	Not checked in
13	ABC Vaccine Event	7712	03-03-2021	9:15 AM	Jane		Test	05-05-1955	123-444-5555	Cancel



## Check In Patients

In some locations, you may need to check in patients in your role as Clinician. To check in a patient, you will need the QR code or the Appointment ID. The steps for [finding the Appointment ID](#) if the patient doesn't have it are reviewed in the previous section.

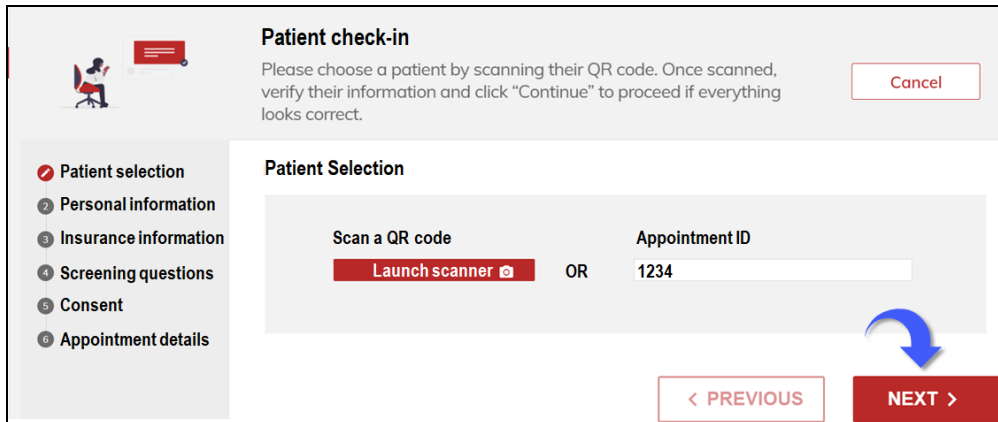
1. To check in a patient, click **Patient Check-in** on the menu bar, on the left hand side or click **Check-in** from the dashboard. The Patient check-in screen will display.

The screenshot shows the 'Patient Check-In' screen. On the left is a sidebar menu with options: Dashboard, Patient Check-In (highlighted with a blue arrow), Walk-In, Summary, Advanced Search, Adverse Form, and Exports. The main area has a search bar with 'Search By Appointment ID' and a text input 'Enter Appointment ID' with 'Search' and 'Clear' buttons. Below is a table titled 'Appointments' with columns: ID, EVENT NAME, DATE, TIME, FIRST NAME, LAST NAME, DATE OF BIRTH, TYPE, STATUS, ACTIONS, and ACTIONS. The table is currently empty, showing 'Items per page: 20' and '0 of 0'.

The Patient Check-In screen will display.

The screenshot shows the 'Patient check-in' screen. The sidebar menu is the same as the previous screenshot, but 'Patient Check-In' is now checked. The main area has a title 'Patient check-in' and a description: 'Please choose a patient by scanning their QR code. Once scanned, verify their information and click "Continue" to proceed if everything looks correct.' There is a 'Cancel' button. Below is a section titled 'Patient Selection' with two options: 'Scan a QR code' with a 'Launch scanner' button and camera icon, and 'Appointment ID' with a text input containing 'ABC123'. At the bottom are '< PREVIOUS' and 'NEXT >' buttons.

2. To begin check-in, you can scan a patient's QR code (received in their confirmation email or text) or verify and enter the patient's Appointment ID.
  - a. To scan a QR code, click '**Launch Scanner**'. A camera will launch to read the QR code. Align the QR code with the camera so that the QR code is showing on screen.
  - b. No QR code? No problem. Just enter the Appointment ID into the Appointment ID field and click **Next**.

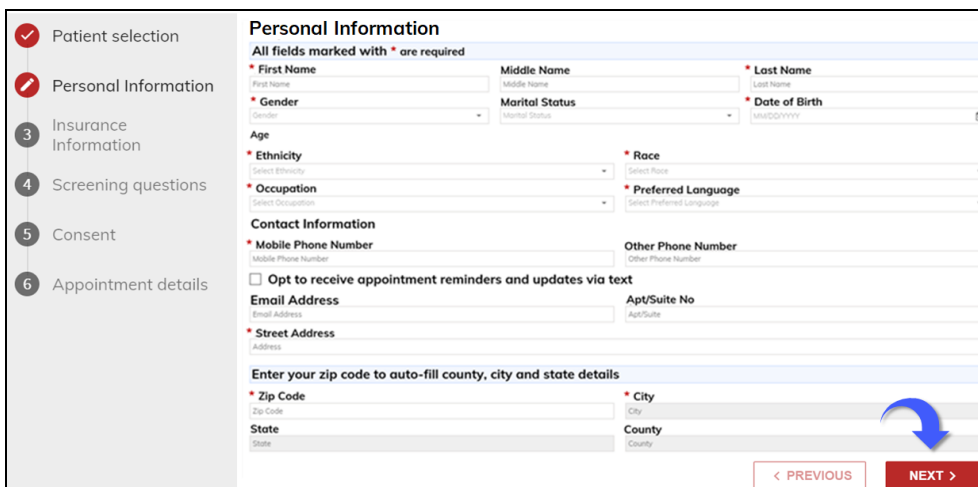


3. Verify the patient's personal and contact information.

You can update information by typing corrections directly into the field. The updates will save when you click the Next button.

Click **Next** when the patient's details have been verified.

**NOTE:** Updates to the Personal and Contact Information can only be completed while the patient's status is Not checked in. Once they are checked-in, this information can no longer be changed.





#### 4. Verify the insurance information

To add or edit the insurance information, you can update information by typing corrections directly into the field.

Click **Next** when the information is verified.

**Health Insurance Information**

All fields marked with \* are required

\* Do you have Insurance?  
☒ Yes ☐ No

\* Type of Insurance  
Medicaid

\* Insurance Company Name  
Insurance Company Name

\* Member ID/Policy Number  
Member ID/Policy Number

\* Health Plan Phone Number  
Health Plan Phone Number

\* Health Plan Address  
Health Plan Address

< PREVIOUS    NEXT >

#### 5. Ask the patient the screening questions. Click **Next** all responses have been recorded.

**Screening questions**

Patient information and health status will be evaluated on-site by a Department of Public Health nurse who will determine if you are able to receive the vaccine on the clinic date. All fields marked with \* are required

\*Are you feeling sick today?  
☐ Yes ☐ No

\*Have you ever received a dose of COVID-19 vaccine?  
☐ Yes ☐ No

If yes, which vaccine product?

\*Have you ever had a severe allergic reaction (e.g., anaphylaxis) to something? For example, a reaction for which you were treated with epinephrine or EpiPen, or for which you had to go to the hospital?  
☐ Yes ☐ No

\*Was the severe allergic reaction after receiving a COVID-19 vaccine?  
☐ Yes ☐ No

\*Was the severe allergic reaction after receiving another vaccine or another injectable medication?  
☐ Yes ☐ No

\*Do you have a bleeding disorder or are you taking a blood thinner?  
☐ Yes ☐ No

< PREVIOUS    NEXT >



6. Review the consent to ensure consent was received electronically.
  - a. If consent was not received electronically, have the patient fill out a paper consent and check the box stating 'Consent Received on Paper.'

**Click Next.**

Consent

☐ Consent Received on Paper

< PREVIOUS    NEXT >

7. Confirm the appointment details and ask any additional questions required for vaccination. If the patient is not eligible to receive the vaccine for any reason (i.e. sickness), you can reschedule or cancel the appointment by clicking the Reschedule or Cancel button.

If the patient is confirmed to receive the vaccination, click **Submit**.

Appointment Details

The following is time scheduled currently for this patient. If no changes are needed please click submit to complete the check-in.

Scheduled Appointment Time	
DATE AND TIME	LOCATION
03-07-2021 6:00 pm	123 Main St Anytown, Arizona

Cancel appointment

< PREVIOUS    SUBMIT

The appointment status will update and the clinician can select Start to begin the vaccination.

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS
1234	ABC Vaccine Event	03-07-2021	6:00 PM	Jane	Test	05-05-1955	Call-In	Start	Reschedule Cancel

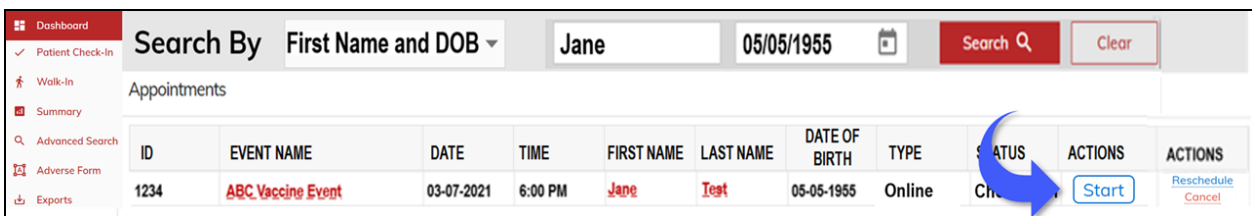
## Start Appointments to Administer & Document the Vaccine

To begin the process of starting an appointment, retrieve the patient's appointment on the dashboard. Review the [steps for finding the appointment ID](#) if the patient doesn't have it.

The patient must be in checked-In status before the vaccine can be administered. If the patient status is not checked in, [review the steps for checking in a patient](#).

When the patient is checked-in and you are ready to administer the vaccine, click Start.

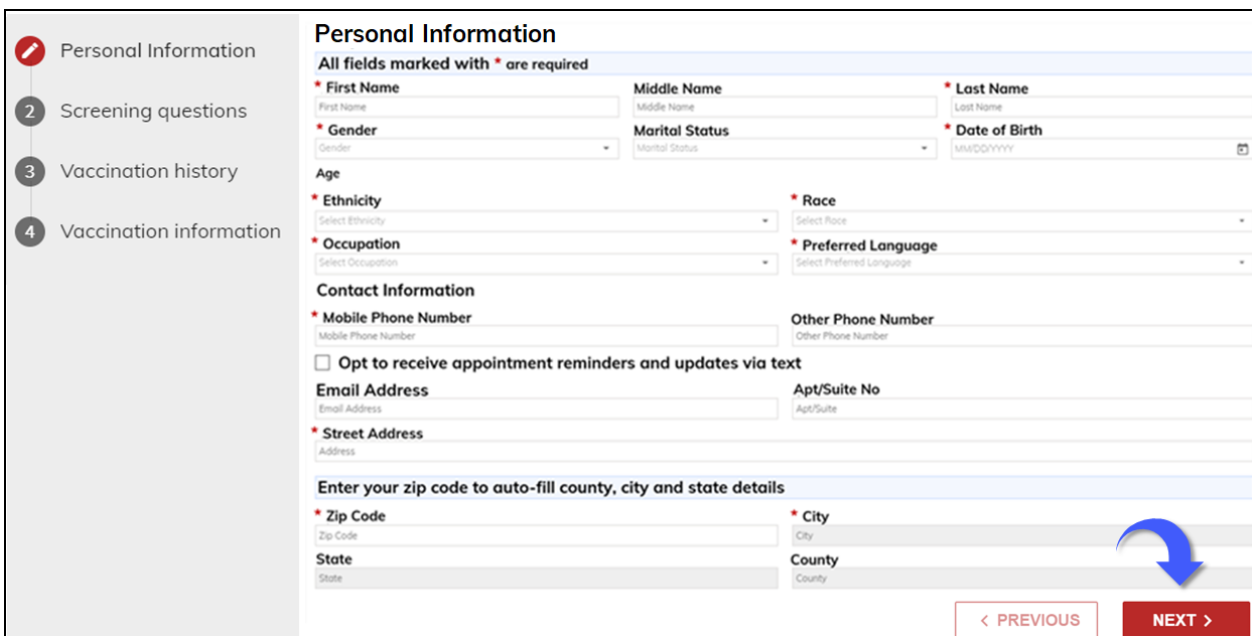
1. As the Clinician, when you are with the patient and ready to administer the vaccine, click on **Start**.



ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS	ACTIONS
1234	ABC Vaccine Event	03-07-2021	6:00 PM	Jane	Test	05-05-1955	Online	Checked In	Start	Reschedule Cancel

2. The patient's personal information will be displayed on the screen. Verify the patient's personal and contact information with them. Click **Next** when finished.

**Note:** Personal and contact information cannot be updated at this time, only at check-in.



**Personal Information**

All fields marked with \* are required

\* First Name:  Middle Name:  \* Last Name:

\* Gender:  Marital Status:  \* Date of Birth:

Age:

\* Ethnicity:  \* Race:

\* Occupation:  \* Preferred Language:

**Contact Information**

\* Mobile Phone Number:  Other Phone Number:

☐ Opt to receive appointment reminders and updates via text

Email Address:  Apt/Suite No:

\* Street Address:

Enter your zip code to auto-fill county, city and state details

\* Zip Code:  \* City:

State:  County:

< PREVIOUS NEXT >

- Review and verify the patient's screening questions. If eligibility to receive the vaccine is confirmed, then click **Next** to proceed. If the patient is not eligible to proceed, click the **Cancel** button in the upper right corner of the screen.

## Vaccination

Review, update, and complete the following application to complete the vaccination.

[Cancel](#)

✓ Personal Information

✎ Screening questions

3 Vaccination history

4 Vaccination information

### Screening questions

Patient information and health status will be evaluated on-site by a Department of Public Health nurse who will determine if you are able to receive the vaccine on the clinic date. All fields marked with \* are required

\*Are you feeling sick today?

☐ Yes ☒ No

\* Have you ever received a dose of COVID-19 vaccine?

☐ Yes ☒ No

If yes, which vaccine product?

\* Have you ever had a severe allergic reaction (e.g., anaphylaxis) to something? For example, a reaction for which you were treated with epinephrine or EpiPen, or for which you had to go to the hospital?

☐ Yes ☒ No

\* Was the severe allergic reaction after receiving a COVID-19 vaccine?

☐ Yes ☒ No

\* Was the severe allergic reaction after receiving another vaccine or another injectable medication?

☐ Yes ☒ No

\* Do you have a bleeding disorder or are you taking a blood thinner?

☐ Yes ☒ No

\* Have you received passive antibody therapy as treatment for COVID-19?

☐ Yes ☒ No

[PREVIOUS](#) [NEXT](#)

- Review the patient information displaying on the Vaccination History from ASIIS screen. Confirm the name and DOB displaying are that of the patient and click the number displaying under ID (this is a hyperlink).

✓ Personal Information

✓ Screening questions

✎ Vaccination history

4 Vaccination information

### Vaccination History from ASIIS

[Set to Done](#)

ID	Local ID	Name	Gender	DOB	Address
<a href="#">9112233</a>	1234	Jane, Test	Female	Tue Mar 05 1955	333 Main St ANYTOWN, ARIZONA, 85007 USA

[PREVIOUS](#) [NEXT](#)



5. Review the patient's Immunization History populated from Arizona State Immunization Information System (ASIIS) to ensure he/she is eligible to receive the vaccination today (i.e. has waited the duration between doses, has not already received 2 doses, etc.).

**Note:** Not all patients will have an ASIIS record. This is either because this is their first dose, they do not have an ASIIS record yet, or the information for the appointment does match their ASIIS record.

Click **Next** to proceed. If the patient is not eligible to proceed, click **Cancel** in the upper right corner of the screen.

**Vaccination**  
Review, update, and complete the following application to complete the vaccination.

Cancel

Personal Information  
Screening questions  
3 Vaccination history  
Vaccination information

**Vaccination History from ASIIS**  
Select One

Jane Test  
DOB: 05/05/1955  
Gender: Female

Vaccine Name	Vaccine Short Description	CVX Code	Vaccine Administration Date	Age when received the vaccine	Completion Status
COVID-19	COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose	208	02/22/2021	66y 2m	Complete

PREVIOUS NEXT

## Administer Vaccine and Record Data

1. On the Vaccination information screen that displays, select the Vaccine Name from the dropdown box. Once the Vaccine Name is selected, other maintained fields will auto-populate (Manufacturer & Date of Expiry). The route defaults to intramuscular but can be changed.

All fields with an \* are required and must be completed. Once you are done entering or selecting data for the remaining fields, click **Complete**.

To cancel administration of a vaccine, click **Cancel** on the top right.

**Vaccination**  
Review, update, and complete the following application to complete the vaccination.

Cancel

COVID 19

\* Date of vaccination  
Today's date

\* Vaccine Name

\* Manufacturer name

\* Body Location

\* Completion Status

\* Vaccinator  
Your Name

\* Lot number

\* Dose Number

\* Date of expiry

\* Route Administration  
Intramuscular

Notes

PREVIOUS COMPLETE



- The Dashboard will now display. [Retrieve the patient record](#) and confirm the patient status displays as Done.

Search By

First Name and DOB ▾

Jane

05/05/1955

Search

Clear

Appointments

ID	EVENT NAME	DATE	TIME	FIRST NAME	LAST NAME	DATE OF BIRTH	TYPE	STATUS	ACTIONS	ACTIONS
1234	ABC Vaccine Event	03-07-2021	6:00 PM	Jane	Test	05-05-1955	C	Done		<a href="#">Follow Up</a>

All vaccine administrations are automatically reported to ASIIS electronically.

This concludes the instructions for the Clinician to administer vaccines and maintain vaccine data.

Please contact your Site Administrator or Organization Unit (OU) Administrator if you have any questions or need assistance with this portal.